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## GEOGRAPHICAL JOURNAL OF ZIMBABWE

Number 20

December, 1989

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page

TRANSPORT AND MARKETING OF HORTICULTURAL CROPS BY COMMUNAL FARMERS INTO HARARE	<i>J.A. Smith</i>	1
STRATEGIES FOR COPING WITH FOOD DEFICITS IN RURAL ZIMBABWE	<i>D.J. Campbell, L.M. Zinyama and T. Matiza</i>	15
ANALYSIS OF ANNUAL RAINFALL IN ZIMBABWE FOR TRENDS AND PERIODICITIES, 1891-1988	<i>D. Mazvimavi</i>	42
TOURISM TO PARKS IN ZIMBABWE: 1969-1988	<i>G. Child, R. Heath and A. Moore</i>	53
LANDSCAPE EVOLUTION IN SOUTHERN AFRICA AND ZIMBABWE: TRADITIONAL AND RECENT VIEWS	<i>R. Whitlow</i>	79
INSTRUCTIONS TO AUTHORS		105

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ISSN 1011-5919

Distributed free to all members

Price \$6.00

© Geographical Association of Zimbabwe, 1989.

Published by

Geographical Association of Zimbabwe  
c/o Geography Department  
University of Zimbabwe  
P.O. Box MP 167  
Mount Pleasant  
Harare  
Zimbabwe

Typeset by

University of Zimbabwe  
Publications Office

Printed by

Reprographic Unit  
University of Zimbabwe  
P.O. Box MP 167  
Mount Pleasant  
Harare

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The Hon. Editor wishes to thank those people listed below who acted as referees or advisors for manuscripts submitted to the Geographical Journal of Zimbabwe, Nos 17 to 20.

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# TOURISM TO PARKS IN ZIMBABWE: 1969-1988

by

G. CHILD, R. HEATH and A. MOORE

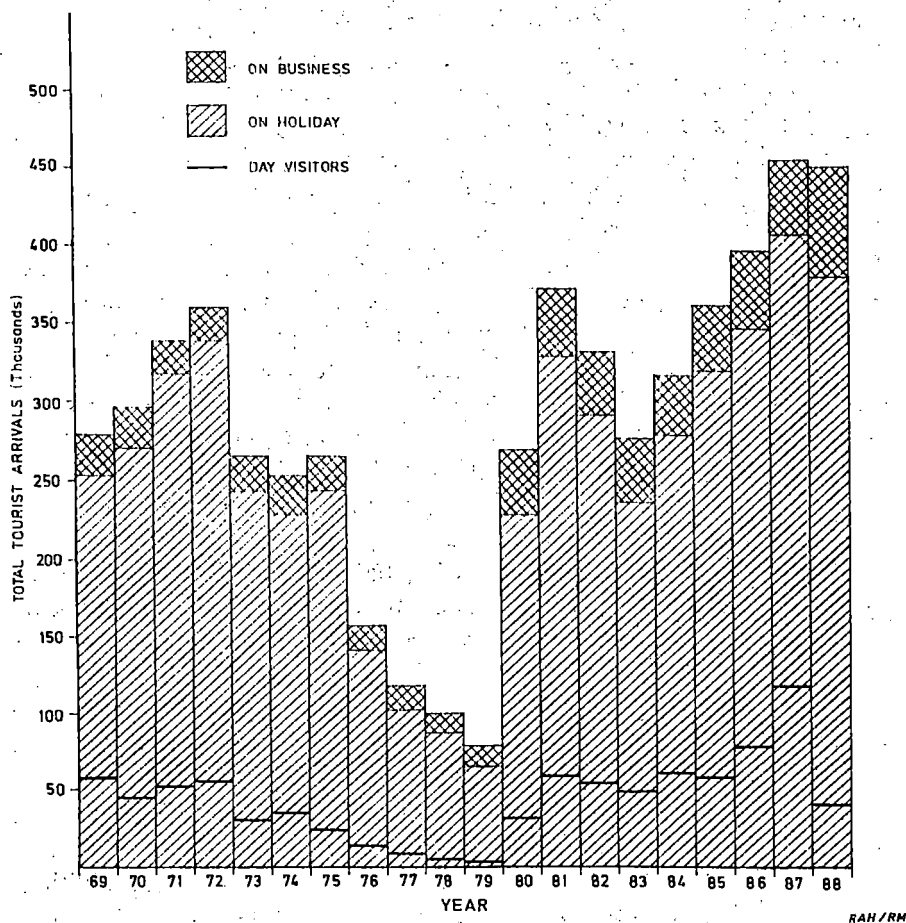
## INTRODUCTION

International and domestic tourism creates considerable economic activity in Zimbabwe and is an important source of foreign currency. The Zimbabwean tourist industry is largely based upon marketing a 'wilderness experience' and relies heavily upon the national parks and other protected areas within the country. By providing visitor accommodation and other services within the areas it controls, the Department of National Parks and Wild Life Management (DNPWLM) is one of the country's major tourist organisations.

While the department's tourism functions are secondary to its overall responsibility for conserving and managing wildlife and protected areas, its role in the national tourist industry is of major significance. This has serious implications for both the tourist industry and the wildlife and wild places upon which that industry depends so heavily. It requires that the Department retains full control over the products generated by the protected areas, so as to maintain the biological and aesthetic qualities of the resource and promote the quality of supporting services. When selling tourist packages, however, the Department should ensure that the resource is not undervalued and does not undercut the market outside the Estate, which is so important for supporting sustainable rural production. The carefully judged compromise needed between providing a public service, which has come to be expected from Western attitudes towards national parks as public amenities, conserving the resources and developing tourism in a Third World country requires reliable information.

This paper presents and discusses data relating to the use of the Parks and Wild Life Estate in Zimbabwe by visitors, from at home and abroad, over the past two decades. It covers the period for which reliable statistics are available, despite the fact that it has been a time of considerable political change and civil disturbance. Not unexpectedly, tourist arrivals to the Parks and Wild Life Estate largely replicate the national patterns of tourist arrivals to Zimbabwe during the period discussed, although there are significant differences in the years following independence, which are highlighted later in the paper.

The steadily increasing numbers of tourist arrivals to the country was not initially disrupted by Rhodesia's unilateral declaration of independence (UDI) in 1965 and the imposition of mandatory United Nations sanctions (Figure 1). After 1972, this growth faltered in response to the intensification of the war which preceded Zimbabwe's independence in 1980 and which mainly affected the rural areas in which most parks and reserves are



Source: Monthly Migration and Tourist Statistics, 1969-1988: CSO, Harare.

Note: These figures exclude foreign visitors in transit and those entering the country for educational purposes.

Figure 1: Tourist Arrivals to Zimbabwe, 1969-1988

located. The immediate effects of the war probably masked the influences on local tourism which would have been expected from the downturn in the global economy in the mid-1970s. World Tourist Organisation (W.T.O.) statistics indicate that there was a worldwide decline in international tourist arrivals in the mid-1970s, largely due to the dramatic rise in fuel prices (Pearce, 1987). Destinations in Africa were most severely affected due to the increased costs of long haul flights from the tourist generating countries. Furthermore, Africa had a particularly bad image overseas, with the whole continent appearing increasingly unstable (Economist Intelligence Unit, 1978). This affected the number of tourist arrivals to many countries in eastern and central Africa, with even well established destinations such as Kenya experiencing a sharp downturn in tourist arrivals in the late 1970s (Rajotte, 1987).

Tourism revived rapidly after independence in April 1980. However, political disturbances in and around Zimbabwe, including bandit activity within the country (mainly in the west) and other factors such as the shortage of motor fuel and the declining value of the Zimbabwean dollar, have influenced visitor patronage of the Parks and Wild Life Estate. These events are summarised in Table 1.

## THE PARKS AND WILD LIFE ESTATE

Parks and reserves managed by the DNPWLM are referred to collectively as the Parks and Wild Life Estate and cover some 5 million ha or 12.7% of Zimbabwe, situated largely in peripheral locations. The Estate is divided into six classes of protected areas (Figure 2) offering a variety of tourist experiences (Child, 1973, 1977, 1985, 1986).

**National Parks:** of which there are 11, cover approximately 2.7 million ha or 6.8% of the country. These areas enjoy the highest protective legal status of any land in Zimbabwe. The management of the natural ecosystems aims at minimal interference with natural processes, but acknowledges that manipulative management may be necessary to cushion the areas against the impact of man or to counter serious ecological imbalances that threaten the integrity of these systems. Land may not be leased within a national park and mineral prospecting and mining are very strictly controlled and permitted only when this is clearly in the national interest. The consumptive use of natural resources is limited to: providing seedstocks in the interests of conservation for recolonising areas where a species is locally extinct; strictly controlled angling in some parks; and the collection of firewood for domestic use within a park. Visitor accommodation is provided but visitor activities are strictly controlled.

**TABLE 1: CHRONOLOGY OF EVENTS AFFECTING TOURISM TO THE ESTATE (after Moore, 1986)**

Year	Event*
1973	Two Canadian girls shot from Zambia at Victoria Falls. War escalates. Mana Pools closed.
1974	Victoria Falls accommodation, camping and caravanning facilities taken over by the Town Council.
1975	War intensifies. Gonarezhou National Park closed to the public. Udu lodges at Nyanga and Nyanyana camping ground at Kariba opened.
1976	Great Zimbabwe amenities taken over by Department of Museums and Monuments. All fees raised.
1977	War intensifies further. Zambezi Camp, Victoria Falls closed.
1978	War intensifies further. Robins Camp, Hwange, closed. Civilian airliner shot down. Road travel only in convoys.
1979	Second airliner shot down. Flights to Hwange suspended. Massive territorial call-up. Elections. Muzorewa government.
1980	General election. Mugabe government. Independence. Public holidays changed. Robins and Zambezi camps reopened.
1981	Dissident disturbances, Bulawayo. More overnight facilities opened. Fees raised. <u>Motor fuel short from October, critical by December.</u>
1982	Security situation in the west serious. Six tourists abducted and murdered. Three others murdered near Nyanga. <u>Fuel shortages again critical in December.</u>
1983	<u>Fuel crisis continues.</u> <u>Security situation in the west very serious.</u> <u>Matobo National Park badly affected</u> , but Hwange less so.
1984	Matobo National Park closed for three months due to security problems.
1985	Bulawayo booking agency opened in June. July – general elections held. Accommodation fees increased in August. Ten cottages, bar and restaurant reopened at Main Camp, Hwange. Deka and Lukosi camps opened in Hwange.
1986	Wilderness Trails reintroduced. Hwange Main Camp included as an option for Flame Lily Tours. Fuel and store facilities reopened at Sinamatella and Robins camps, Hwange National Park. Increase in visitor usage of Chizarira, following publicity of Wilderness Trails. NAM summit. Entry fees increased significantly.
1987	Restaurant at Sinamatella reopened. Robins No.2 Camp renovated and reopened. Matobo suffered from security problems. Gonarezhou closed early due to security problems. Formal bookings introduced for Chizarira due to increased interest in the park. Camping sites opened at Darwendale. Sebakwe opened to day visitors. Fees increased for selected units of accommodation, after considerable upgrading had been undertaken. A decline in visitor usage of the parks due to a drop in foreign visitors, security considerations, drought and the general economic situation.
1988	Unity Accord brought immediate improvement in security situation in Matabeleland. Gonarezhou not opened for the 1988 season due to cross-border security problems. Freeze on wages and prices in force.

\* Note: Excluding the opening or closing of minor facilities that do not affect trends.

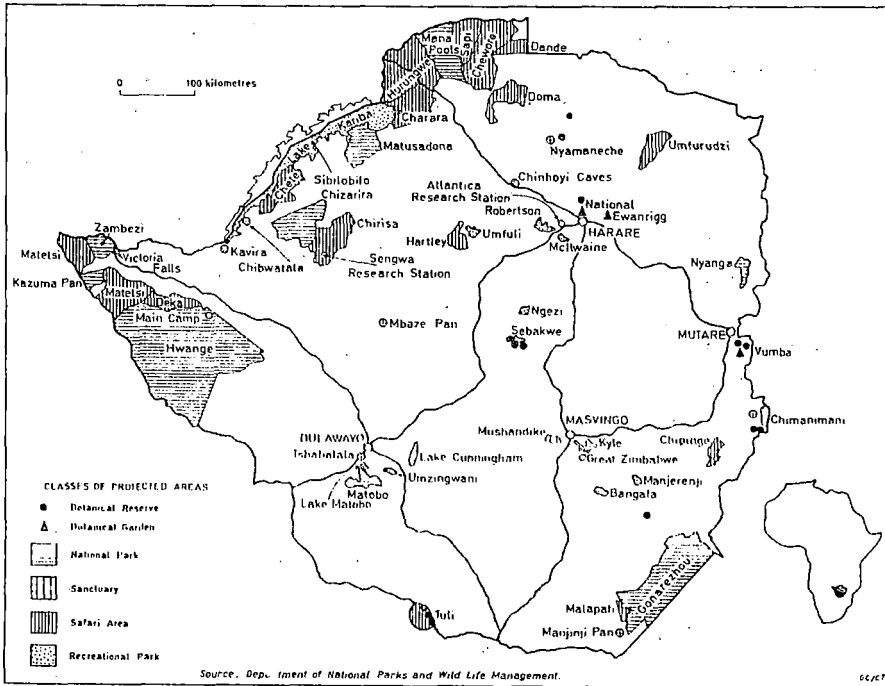


Figure 2: The Parks and Wild Life Estate, Zimbabwe

**Botanical Reserves, Botanical Gardens and Sanctuaries:** are separate categories of protected areas which also enjoy very high legal protection. Botanical Reserves and some Sanctuaries are in effect mini-national parks for the protection of individual species of animals, plants or biotic communities and have similar objectives to those of national parks, but within the limits imposed by their small size. Some sanctuaries are managed for educational or other special purposes. Botanical gardens, as the name implies, are managed gardens for the propagation of mainly Zimbabwean species or particular groups of plants such as cycads.

**Safari Areas:** have replaced and extended the scope of the old Controlled Hunting Area concept, in recognition of the fact that these protected areas lend themselves to a range of uses besides recreational hunting. The policy varies from area to area, depending on the circumstances, but generally these areas are managed with similar aims to those of national parks except that there is more freedom of action. Recreational hunting and even the cropping of wild populations may be permitted. In some safari areas, recreational hunting is likely to remain the predominant use, at least for the



foreseeable future, while in others non-hunting safaris, hiking and the like may assume paramountcy and are actively encouraged. While land is seldom leased in a safari area, hunting and other facilities may be offered on short-term concessions of up to five years. Some safari areas are destined for eventual elevation to national park status.

**Recreational Parks:** are mainly associated with large impoundments, particularly where these are near major urban centres. Here, natural features and the rural atmosphere are preserved and protected so that these areas contribute significantly to the preservation of biological diversity, although a wider range of outdoor activities may be allowed than is either possible or desirable in the truly wild areas. Most attract heavy visitor usage and it is government policy to examine the recreational potential of each new large dam with a view to deciding whether it should become the nucleus of a recreational park.

The Parks and Wild Life Estate represents an integrated system of protected areas in the six land categories; but with each area being subject to specific policy directives for that area so that together they contribute to the national obligation towards protecting unique areas, conserving their biological diversity and providing a range of outdoor recreational opportunities. Attractions provided by the Estate include beautiful mountain scenery, excellent game viewing and hunting, and the world-famous Victoria Falls (Table 2), with the main draw in most recreational parks being large, man-made lakes (Child and Heath, 1989).

The Department offers a variety of accommodation types in these areas, varying in price and quality. The private sector is encouraged to supplement these amenities with hotels and other overnight facilities outside the parks but is not permitted to build any permanent structures within the Estate, except in a few recreational parks. Private enterprise may, however, lease parks facilities such as restaurants and the hotel at Nyanga from which to offer services.

Exclusive bush camps provide luxury accommodation in isolation and some are leased on a weekly basis, allowing a party of visitors exclusive use of the camp and a substantial area of land around it. Charges are unaffected by whether the camp is used for the full six nights or by the number of visitors in the party, up to the prescribed limit.

Other accommodation types are mainly grouped into camps, although all types may not be available at any particular camp. Lodges are fully equipped one or two-bedroomed units. Cottages are similar but lack cutlery and crockery, while chalets share ablution facilities and have only outdoor cooking arrangements. Camping and caravanning sites cater for differing

TABLE 2:  
THE MAJOR NATURAL ATTRACTIONS AVAILABLE AND THE DOMINANT VISITOR ACTIVITIES UNDERTAKEN  
IN ZIMBABWE'S PROTECTED AREAS

			Major Natural Attractions (No. of Areas)										Dominant Visitor Activities (No. of Areas)											
Protected Area Category	No. of Areas	Area '000 ha.	Mountains	Waterfalls	Major Rivers	Large Waterbody	Scenic (Other)	Natural Vegetation	Plant Collection	Spectacular Wildlife	Stocked 'game parks'	Spectacular Avifauna	Geological Interest	Historical Interest	Islands	Game/Bird Watching	Botanising	Historical Interest	Walking/Climbing	Sightseeing (Other)	Hunting	Angling	Canoeing	Watersports (Other)
National Parks	12	2703.5	5	2	4	1	2	3		8	1	6	1	3		8	3	3	5	4		3	3	1
Botanical Reserves (1)	15	1.5					15									1	3		1					
Botanical Gardens	3	0.6						3									3							
Sanctuaries	6	18.6	1	1							2	2		1		1					1			
Safari Areas	17	1896.3	5		10	4				11		2			2	9			1		15	7	5	4
Recreational Parks	14	342.1				9	2				2	1	3		1	3			2	2		7		4
TOTAL	67	4962.5	11	3	14	14	4	18	3	19	5	11	4	4	3	22	9	3	9	6	15	18	8	9

1 Includes only those Botanical Reserves not included within a protected area of lower legal status.

Source: Department of National Parks and Wild Life Management

numbers of parties of up to six people and the two are separated in some areas as campers and caravanners do not always mix well together. Accommodation units and camping/caravanning sites are charged for as entities by the night irrespective of the number of people in the group. A few of the camps in game viewing areas are closed seasonally during the rains (November to April), when viewing is poor and the gravel roads are often impassable.

Attempts have been made to build tourist facilities out of natural materials and to use colours that blend in with the surroundings so as to enhance their aesthetic appeal and reduce their visual impact. It is policy to restrict the size of any camp to approximately 100 beds, in one and two-bedroomed units, and to limit camping and caravanning to not more than 25 parties each. This limitation on the maximum size of any camp has several advantages. Firstly, it facilitates the protection of the natural qualities of the areas in which the camps are located, by limiting the number of people and vehicles impacting on the resources. Secondly, it preserves the aesthetic appeal on which the attractiveness of this type of tourist destination depends, by limiting the impacts of visitors upon each other. Finally, it reduces the cost of infrastructural support, mainly roads, for each camp. In many areas this is the major capital outlay when providing a camp and can be neglected only at the risk of the marketability of the whole complex. About five kilometres of game viewing road is needed for each visitor vehicle (i.e. for a maximum sized camp *ca.* 450 km of roads), but this can be reduced a little by sealing the surface of the road to limit dust and noise and by providing game viewing blinds to attract people off the main roads.

Where necessary, as in Hwange and Mana Pools, the number of vehicles allowed into a park at any one time is restricted to the capacity of the road network, while limitations on the types and sizes of vehicles are dictated by standards of road construction, visitor safety and disturbance to animals. With few exceptions, it is an offence for vehicles to leave the roads because of the damage caused to the natural vegetation and because vehicles off the road are a visual imposition on other visitors.

### VISITORS TO THE ESTATE

Moore (1986) presented available data on visitor use of the Estate between 1960 and 1985, but had reservations over the accuracy of some of the statistics, particularly those prior to 1969 which appear to have been somewhat exaggerated estimates. This paper extends and elaborates the information in Moore's departmental report, for the 20 year period since 1969.

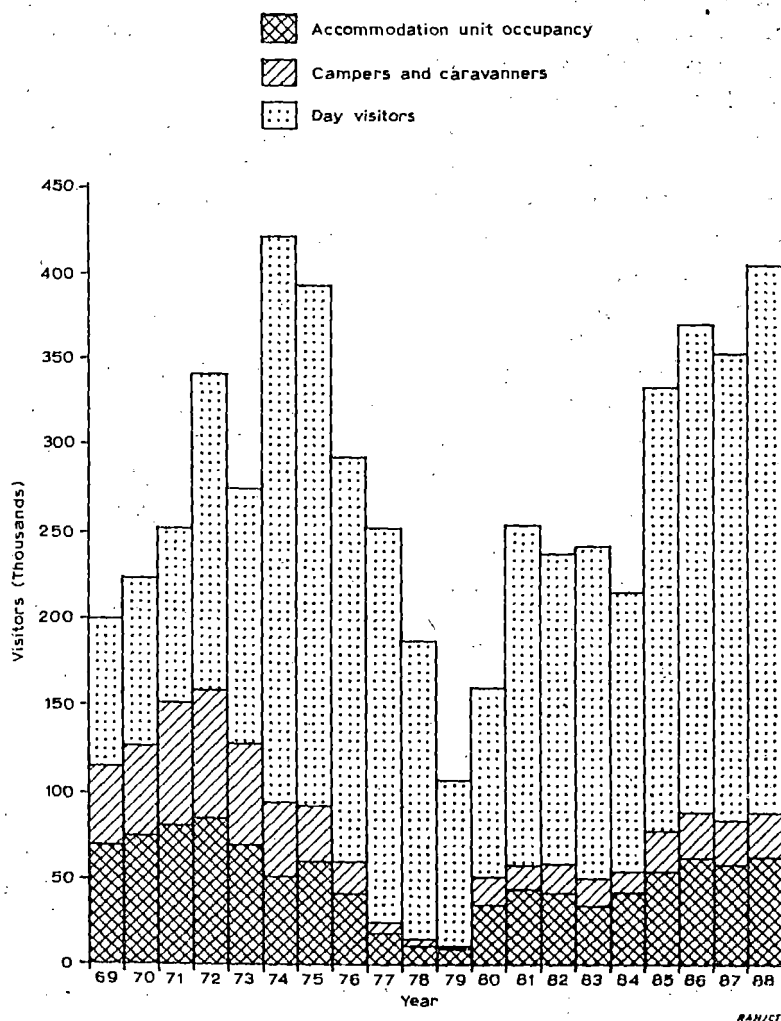


Figure 3: Visitors to the Estate, 1969–1988

### DAY VISITORS

The recorded numbers of day visitors to the Estate are included in Figure 3, although the data contain inconsistencies and must be used with some caution. For example, Moore (1986) could trace no records of day visitors to Mcllwaine between 1969 and 1973 and after that they fluctuated

widely between 29 000 and 180 000 per year. This would suggest that, in some years, the figures included only those people who paid to enter the fenced 'game park' while in others it may have been an estimate for the whole park with its several uncontrolled entrances.

There are no figures for Nyanga, nor for the Victoria Falls between 1969 and 1973 and between 1977 and 1979 and those that are available for Victoria Falls apply only to the game section (now Zambezi National Park) and not to the precincts of the falls (now Victoria Falls National Park). Matobo lacks figures for 1969 to 1973, Ewanrigg for 1969, 1970 and 1977. Great Zimbabwe, which was part of the Estate until 1976 when its administration was handed over to the National Museums and Monuments, has records for only 1971.

These and other deficiencies, arising mainly from the difficulty of obtaining reliable data in areas where there is no charge to enter and hence no regulation over entry, make interpretation of these figures difficult. This is a pity as, in those years (1974–1976 and 1984–1988) where the data for day visitors seem reasonably complete, they outnumbered overnight visitors by 3 or 4:1, excluding Nyanga and Victoria Falls which, if included would probably raise this ratio to 4 or 5:1.

While many day visitors are just that and travel from their homes to nearby parks for the day, others stay at hotels remote from urban centres and commute into parks like Hwange, Nyanga, Victoria Falls and Zambezi. There is an entry charge to Hwange National Park and because Hwange Main Camp, the park headquarters, is 81 km from the town of Hwange and 280 kms from Bulawayo, the majority of the day visitors to this camp will have been accommodated at the two hotels near the park entrance. The newer of these two hotels is designed primarily to cater for game-viewers.

Figure 4 relates the numbers of day visitors entering through Hwange Main Camp to overnight arrivals at the camp. The proportion of day visitors to overnight arrivals increased steadily from 1969 until just before the end of the war, when the daily flight schedule to Hwange was suspended. The number of day visitors was low in 1979 and 1980 but then grew more rapidly than overnight arrivals<sup>1</sup>. The 1988 figures, however, show a drop in day visitors to Main Camp but an increase in the numbers using the accommodation units. This may be due to the effect of the Unity Accord, signed in

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1. As day visitors are charged for each 24 hour period and many overnight arrivals spend more than one night at Main Camp (average in 1985 was 1.76 to 1.89 nights, depending on the season; Moore, 1986) there were probably still more people using the Main Camp region of the park who were staying in the park than were staying outside.

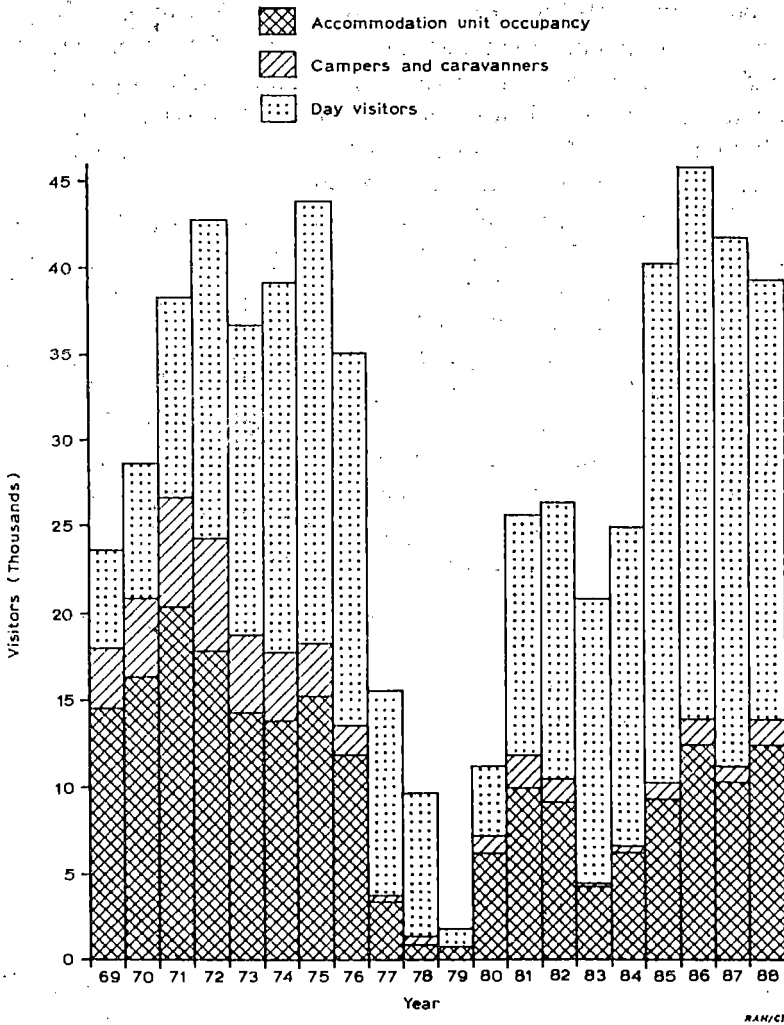


Figure 4: Day Visitors and Overnight Arrivals at Hwange Main Camp

December 1987, which has considerably improved the security situation in Matabeleland, so that visitors now feel happier about driving on their own to areas such as Hwange National Park.

USE OF OVERNIGHT AMENITIES

General Trends

The similarity in the form of the graphs in Figures 1 and 3, for the period 1969-1979 illustrates the overriding effect of the war on all tourism

to and within Zimbabwe. However, while recovery in the use of the Estate's overnight accommodation was noticeable in 1980, particularly as independence only became effective in April at the onset of the high season, it was less spectacular than the recovery of foreign arrivals to the country (Figure 1). It was also less apparent amongst campers and caravanners than amongst those using the accommodation units.

Whereas, by 1982, holiday arrivals to Zimbabwe had almost regained the level of the 1972 peak, overnight visitors to the Estate were only about one third of the 1972 level. In 1972 campers and caravanners made up about 46% of the overnight arrivals to the Estate but, in 1982, this figure was only 28.2% and by 1987 had only increased to 31.2%, dropping again to 28% in 1988, probably due to the closure of Gonarezhou National Park. Before independence, visitors to the parks, including local residents, showed a fairly consistent relationship to international tourist arrivals in the country of about 1:2.4 but after independence, this ratio declined to between 1:4.4 and 1:6.3 (Figure 5). The marked shift in the ratios suggests a major change in the patterns of tourist behaviour with independence.

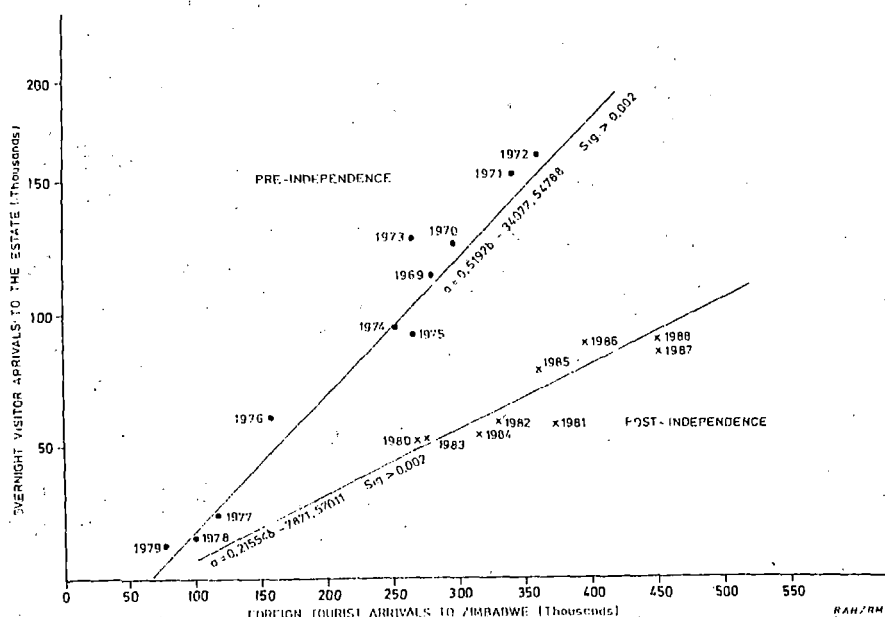


Figure 5: The Relationship between Foreign Tourist Arrivals to Zimbabwe and Overnight Visitor Arrivals to the Estate Before and After Independence

This is in line with the relatively poor performance of the camping and caravanning amenities in the Estate since 1980 and the higher proportion of day visitors entering Hwange through Main Camp in 1982 to 1988, compared with those who did so between 1969 and 1975, before the war led to the rapid decline in tourism. There are several possible explanations for the apparent change in tourist behaviour. Firstly, the rapid rise in fuel prices while tourism was in decline during the height of the war, may have made caravanning in particular, and family motoring holidays in general, less popular. This may have been accentuated by the self-catering requirements and the necessarily high level of dependence upon personal transport of park guests.

Secondly, advertising of the Estate and the services it offers were reduced. The DNPWLM has no budget for marketing as this is a recognised function of the national tourism authority and a division of responsibility dictated by Treasury. In the mid-1970s, the National Tourist Board featured the Estate prominently in its marketing strategy but, since the mid-1980s, this has not been the case as the Zimbabwe Tourist Development Corporation, which replaced the Board in 1984, has a changed emphasis. A recent survey of visitors at Victoria Falls, Hwange and Kariba (Heath, 1990) would tend to support the possibility that reduced advertising has affected the proportion of overnight visitors to the Estate.

Thirdly, the structure of the domestic or foreign markets, or both, has changed since independence and economic sanctions have been lifted. This point is discussed more fully later in the paper. Finally, there is now more effective competition from the private sector.

The answer probably lies in a combination of these and other factors, but needs to be investigated. Most visitor amenities in the Estate were built before independence, to cater for the demand at that time and may no longer be suitable for a changing market. If this is so, it is important that park planners should understand the new needs. If reduced foreign visitor usage relates to the lack of marketing of the Estate's services, this should be rectified so as to achieve a more satisfactory return from investment.

### **Preferred overnight amenities**

The overall decline in camping and caravanning since 1980 has been noted and is confirmed in Table 3, based on a selection of destinations where, with the exception of Nyanga, the relative availability of accommodation facilities changed little between the three four-year periods used for comparison, excluding the main war period (1974-1979).

The use of accommodation units was roughly similar in the two earlier periods at Mcllwaine, Ngezi, Matobo and Kyle but was much higher after independence at Nyanga, where a new camp with only accommodation



TABLE 3:  
PROPORTION OF OVERNIGHT VISITORS USING ACCOMMODATION OR CAMPING AND  
CARAVANNING FACILITIES BY SELECTED DESTINATIONS AND PERIODS

DESTINATION	PERIOD					
	1970-1973		1981-1984		1985-1988	
	Accommodation Unit Occupancy	Campers and Caravanners	Accommodation Unit Occupancy	Campers and Caravanners	Accommodation Unit Occupancy	Campers and Caravanners
McIlwaine	18072	11564	15709	4073	24844	7342
Hwange Main Camp	69037	21589	29647	3532	44382	4676
Ngezi	3392	10310	3762	5106	5012	6438
Nyanga	22645	30925	48616	13221	59588	14019
Matobo	25096	27521	18703	5173	32656	7480
Kyle	10573	4413	11992	4410	16624	8778
TOTAL	148815	106322	128429	35515	183106	48733
% of 1970-73	-	-	86.3	33.4	123	45.8

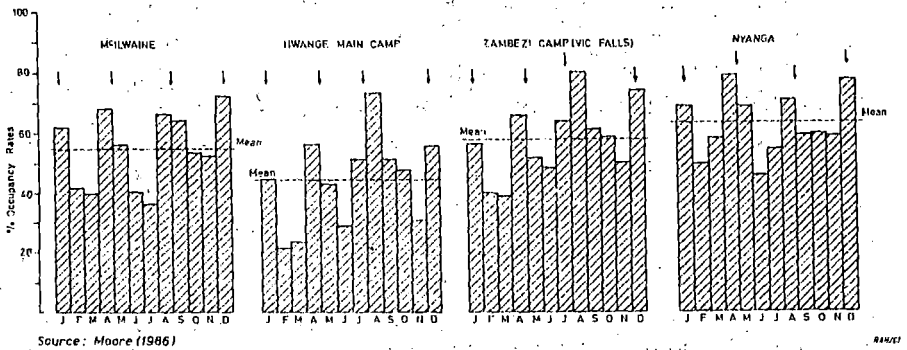
units was opened in 1975 (Table 1). The use of such units was much lower in Hwange in the second period. Against this, there was a substantial drop in the numbers of campers and caravanners to all the destinations except Kyle, where the limited availability of accommodation units probably meant that camping and caravanning retained their popularity. During the most recent period, 1985–1988, the use of the accommodation units has increased markedly in all six destinations, although it has not yet reached the 1970–1973 levels at Hwange Main Camp. Numbers of campers and caravanners, while increasing slightly over the 1981–1984 period, still comprise less than 50% of the 1970–1973 totals.

There may be several reasons for the evident decline in popularity in camping and caravanning, which should be investigated as this decline could have a marked bearing on the provision of amenities in future and the structuring of tariffs.

### Seasonal Patterns of Use

Figure 6 illustrates the monthly occupancy in accommodation units, for the period 1981–1985, at four camps which remain open throughout the year. A striking feature of the data, to be expected during the recovery of tourism to the Estate, was the low level of use at peak periods in the early 1980s, compared with a decade before when, frequently, all units and sites were fully booked. As in the past, the peaks coincided with school vacations (indicated by arrows on Figure 6) and public holidays, emphasising their influence upon the domestic tourist industry. This is of little consequence while there is under-utilisation at all times, but becomes highly significant once occupancy approaches 100% at peak periods. By 1988, with the growth in the use of accommodation units, almost 100% occupancy of these units was occurring during school holidays, public holidays and over weekends. Under these circumstances, the only way to increase utilisation of the units is by encouraging mid-week usage during the quieter times of the year.

By concentrating rather than spreading use, school vacations tend to create bottlenecks, limiting the benefits from overall investment in facilities as well as the total contribution to the economy. This is particularly noticeable in August when local school holidays coincide with the peak summer holiday period in the northern hemisphere and the prime game-viewing season in Zimbabwean parks. If school holidays coincide with high arrivals of foreign visitors, it results in competition with domestic visitors, complicates marketing and leads to a loss in foreign exchange earnings. Public holidays have the same result and can have a disproportionately high effect in reducing foreign exchange earnings when, for example, a long weekend breaks up a peak for visitors from an important foreign source. The



**Figure 6: Average Monthly Accommodation Unit Occupancy at Four Destinations, 1981-1985**

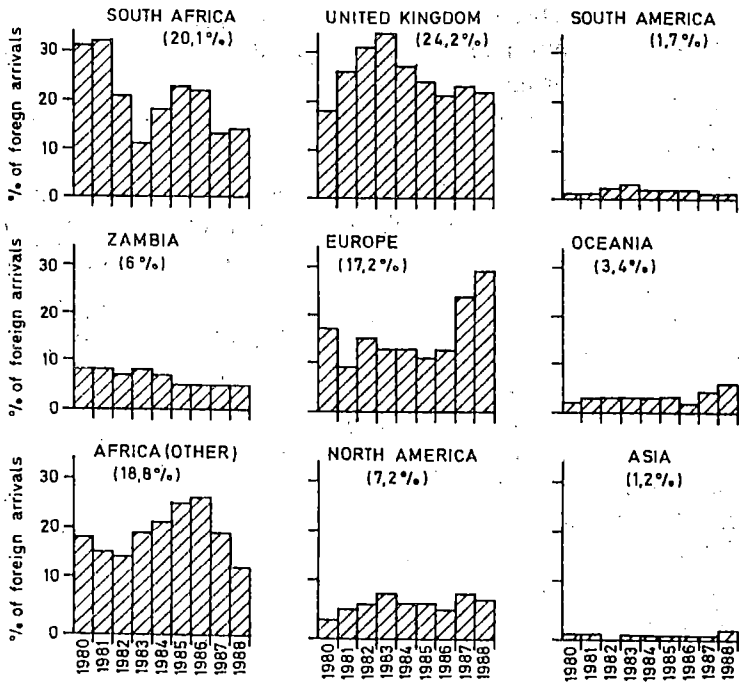
Zimbabwean public is accustomed to the academic calendar and public holidays determining its outdoor recreational patterns, but this may not be cost-effective to the nation.

#### Foreign and domestic visitors

Between 1980 and 1985 domestic arrivals to use overnight accommodation on the Estate numbered between 45 000 and 46 000 per year, with lower figures in 1983 and 1984 as a result of dissident activity. Since 1986, the numbers of domestic visitors have increased steadily. Foreigners averaged 32.7% of the total visitors during the nine year period, although the ratio increased slightly in 1985 and 1986 (Figure 7b). Foreigners may visit more than one area of the Estate during their stay in the country and each visit would be recorded as a separate arrival if overnight accommodation were used. However, between 1980 and 1988, such arrivals represented between 1:11 and 1:18 of the foreign tourists entering the country. This is a much lower ratio than that of the early 1970s, when the relationship between foreign overnight visitors to the Estate and total foreign tourists to the country was in the order of 1:3.

Such a major shift might reflect the greater use of road transport by foreigners during the early 1970s and hence the greater likelihood of their calling at more than one park destination, but a change in the behaviour of foreign visitors seems more probable. Many Zambian arrivals are known to come to Zimbabwe to shop (Zinyama, 1989). There are more international conferences in Zimbabwe, and probably more people visiting the country from further afield and mixing business with pleasure, since the

(a) By country of origin



(b) As a percentage of all visitors to the estate

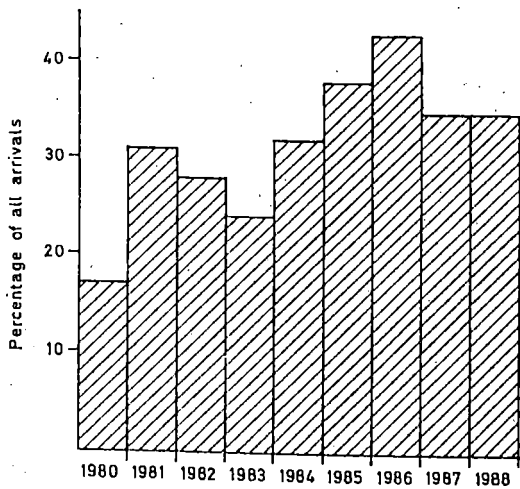


Figure 7: Foreign Arrivals to the Parks and Wild Life Estate, 1980–1988

lifting of sanctions (Zimbabwe Tourist Development Corporation, 1988). A small proportion of foreign visitors are likely to know about the park services, in the absence of adequate promotion. With more air travel available, the inconvenience of self-catering and the exorbitant rates charged for the limited car hire services may make destinations in the parks less attractive. These are some of factors that may account for the change in the behaviour patterns of foreign tourists to Zimbabwe.

During the early 1970s, South Africans dominated the foreign tourist market but, since independence, they have been overshadowed by British arrivals to the Estate (Figure 7a). The category 'Africa-other', mainly from Botswana, showed fairly steady growth between 1981 and 1986 and, between 1983 and 1987, eclipsed South Africa as a place of origin. The declining importance of South African visitors probably relates to the political tension existing between that country and Zimbabwe, to the increasing development of hotels, casinos and holiday resorts within the South African 'homelands' (Wellings and Crush, 1983), and to a recent downturn in the South African economy. Botswana had a buoyant economy during the early 1980s and is on friendly political terms with Zimbabwe. However, the relative decline in the numbers of visitors in this category during 1987 and 1988 is disturbing. The high number of British arrivals is pleasing, especially as a search for Zimbabwean promotional material amongst leading British tour operators in 1985 revealed very poor coverage. According to rough calculations, South Africa received about 50% of the African coverage, Kenya about 30%, Malawi about 15% and the rest of Africa, including Zimbabwe, received the remaining 5-10%. Despite this poor coverage, Nyaruwata (1986) indicated that Zimbabwe ranked second after Kenya and ahead of Malawi, Tanzania and Zambia as an African tourist destination with British tour operators and was the favourite destination for West German tour operators.

Zambia's share of the local market has declined from about 8% to about 5%. This decline may be associated with the deterioration of that country's economy. Europeans have increased from an average of about 13% between 1980 and 1986, to 29% in 1988, while North Americans have remained relatively stable at around 7%, which represents a small but steady growth in numbers if the 1983-1984 trough is ignored. This is also true of the minor markets in Oceania (mainly Australia, 3%), South America (2%) and Asia (1%). Although, overall, the proportions of foreign visitors increased during the period 1980-1988, only in 1986 did they exceed 40% of the total visitors to the Estate (Figure 7b).

Amongst overnight foreign visitors, Hwange, followed by Nyanga and Zambezi Camp at Victoria Falls, were the most popular destinations and contributed 64% of all foreign arrivals (Table 4). Kyle, Matobo, Mana



Pools and McIlwaine made up a further 28%. Hwange ranked as the most favoured destination for people from all origins except South America and Asia, for whom it ranked second behind Nyanga. Table 4 details the proportions of foreign visitors, by country of origin, to visit each of the major destination areas in the Estate.

As these data relate only to the use of the DNPWLM facilities, they would need to be combined with hotel usage levels in order to judge the real popularity of different tourist destinations in Zimbabwe with people from different parts of the world. They do, however, serve to emphasise the importance of promoting the facilities in the Estate and the potential conflicts that can be expected between domestic and foreign tourism at places like Victoria Falls, Hwange and Nyanga. This is especially important at Victoria Falls which is Zimbabwe's major international attraction, but which has an upper limit of some 100 000 visitors per year, if the essential qualities of the 20 ha 'rain forest' overlooking the falls, are to be preserved.

While the present capacity of Hwange is limited, it can easily be increased by providing more camps and roads, for which planning is already in hand. Expansion at Victoria Falls will be much more difficult. Careful planning and skilful marketing will be needed to attract visitors away from frequent visits to the falls themselves, through the provision of alternative attractions. The same will apply to the World Heritage site at Mana Pools, with its spectacular populations of elephant and other big game animals, where the present game-viewing spectacle is concentrated onto 150 sq. km. of 'floodplain'.

### Revenue

Unfortunately, the revenue figures from tourism to the Estate are not as useful as would be desirable due to inconsistencies in recording over the years, so that the data in Table 5 must be used with some caution. Accommodation fees were raised three times in the twenty years under review, in October 1976, July 1981 and August 1985, while entry fees were increased in 1976, 1981 and 1986.

Total actual revenues grew steadily during the twenty year period, despite the decline in the number of overnight arrivals from 128 000 in 1970 to 52 000 in 1980, with only a partial recovery by 1988. In this time, receipts increased almost fivefold in actual terms, but declined in real terms after peaking in 1980.

The average length of stay during the early 1970s was around 1.5 nights, rising to about 2.0 nights in 1988. It cost no more than about Z\$2.00 for one night's accommodation in 1970 and this was just over Z\$11.00 in 1988. In real terms, the 1988 prices were very cheap, despite the three increases in tariffs. This is in line with the government's policy of keeping

**TABLE 5:**  
**REVENUE FROM TOURISM IN THE ESTATE**

YEAR	REVENUE EARNED			
	Actual	1970 Dollar	Actual/	1970 Value*/
	ZW\$	Value*	Visitor #	Visitor #
		ZW\$	ZW\$	ZW\$
1970	414 605	414 605	3.25	3.25
1975	422 146	329 728	4.49	3.45
1980	940 817	470 409	17.92	8.91
1985	1 298 528	341 781	16.39	4.30
1988	2 023 105	382 439	22.51	4.26

\* Total revenue, including that from day visitors, divided by total overnight arrivals.

\* 1970 values obtained from the high income cost of living index for each of the sample years. Source: Consumer Price Index, Central Statistical Office, Prices Section.

such charges within the reach of a large number of Zimbabweans. The merit of such a policy is discussed below.

Until accurate and comparable records of revenue earned by the Estate become available for a number of years, it is difficult to make definite statements about its income generating capacity. Furthermore, the indirect and hidden value of the Estate to national tourism revenues awaits detailed analysis which is beyond the scope of this paper.

## DISCUSSION

The preceding sections have reviewed available data relating to tourism in the Parks and Wild Life Estate in Zimbabwe and have highlighted two major trends which have developed since 1980. Firstly, there appear to have been substantial changes in the nature of the market for which the Estate is catering. Secondly, there has been a decline, in real terms, in revenue earned by the Estate through tourism.

In terms of the changing market, certain points require emphasising. While day visitor numbers have more than doubled in the twenty years under consideration and, by 1988, had almost reached the peak figures of 1974, visitors using overnight accommodation of all types in 1988 represented only 78% of those using similar accommodation in 1969 and only 56% of the overnight arrivals during the peak year of 1972. The increasing



proportion of day visitors during the 1980s is also clearly shown by the analysis of data for Hwange Main Camp (Figure 4). While some of the increase in day visitor usage may be associated with increased air travel and the high costs of motor fuel and car hire in Zimbabwe, some may well be connected with inadequate suitable types of accommodation within the Estate.

Associated with the increase in day visitors is the decline in the use of camping and caravanning sites (Table 3 and Figures 3 and 4). It is this decline which is largely reflected by the lower numbers utilising overnight accommodation in the Estate. Certainly, during 1988, the accommodation units were almost fully subscribed during the peak periods and would-be visitors are finding it increasingly difficult to obtain accommodation in the park of their choice. It may be necessary for park planners to concentrate on providing fewer camping and caravanning sites and more accommodation units in future development plans, so that visitor amenities are more suited to the changing market.

As far as foreign visitors are concerned, the most noticeable feature has been the decline in the proportion making use of the Estate. During the 1970s, one out of every three foreign arrivals utilised the overnight facilities provided in the parks. During the 1980s, this proportion has varied between 1:11 and 1:18. While some of this decline may be due to the changing nature of tourism to Zimbabwe, with an increased emphasis on business, conferences and shopping trips, there is sufficient evidence to suggest that the decline may be partly attributed to the current lack of advertising of the amenities provided by the Estate. Heath's (1990) survey of Victoria Falls, Hwange and even Kariba, where there are only very minor DNPWLM facilities, revealed that once the nature of the overnight amenities offered by the Estate is discovered, they are highly appreciated by visitors. Unfortunately, since the change from the National Tourist Board (NTB) to the Zimbabwe Tourist Development Corporation (ZTDC) in 1984, there has been no organisation sufficiently charged with marketing the Estate, and the DNPWLM receives no allocation for this purpose.

Whereas the NTB was a powerful blend of private and public sector representation and skills, devoted to planning and marketing the country's tourism and emphasised the Estate, ZTDC has become a parastatal tourist trading entity with strong parochial interests. While there may be justification for retaining the ZTDC, there is also an urgent need to re-establish a promotion-oriented NTB and to provide the DNPWLM with funds with which to help market the Estate itself. Such an arrangement would allow the Department to harmonise its promotional effort with available amenities. The new NTB should concentrate upon promoting the whole country and

upon bringing together the best available skills in order to evolve an integrated national tourism strategy and a coordinated national tourist industry.

There has been a decline, in real terms, of revenue earned through tourism by the Estate. This is largely due to prevailing attitudes, which view the creation of protected areas as a social service that should be available to the public free or at a nominal price. State-subsidised social services in a developing country like Zimbabwe, with the many calls on government's limited resources, are fair only if the need for them is real, especially amongst disadvantaged sections of society. Many park visitors are foreigners and those from Zimbabwe are mostly whites in the upper income bracket (Heath, 1990). While there is a strong latent demand among black Zimbabweans in the upper income groups,<sup>2</sup> few poor people within Zimbabwe are interested in the type of attractions on offer in the Estate (Child and Heath, 1989) and, if they were, few could use them regularly, even at the present low tariffs. There is also some contradiction between Zimbabwe's foreign tourist marketing strategy, aimed at the up-market (Gardner, 1973; Chitepo, 1986) and the low prices charged for the use of the Estate and its facilities.

Budget allocations for managing the Estate have declined in real terms since 1980. Visitor services, including some which are labour intensive, have had to be reduced and opportunities for developing potential attractions have had to be foregone. These are self-defeating trends. Available evidence supports the need to increase the charges applicable in the Estate from their present low levels. In 1976, when the entry fees to some recreational parks were raised quite substantially, there was vociferous public objection and the minister concerned lowered them again. During the brief period while the fees were high, there was an expected noticeable drop in visitors, but a significant increase in revenue was earned. Had the minister not given in, it seems likely that visitor numbers would soon have recovered, particularly once tourism revived after independence. While all fees were raised in 1979 and 1981, accommodation fees in 1985 and entry fees in 1986, these rises have been minimal and still represent an undervaluing of the amenities provided. Accommodation fees were again raised

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2. While tourist facilities have been open to all races since 1978, research into user characteristics in the major resort areas (Heath, 1990) indicates that the proportion of black Zimbabweans actually visiting those areas comprises no more than 3-4% of the total visitor numbers. However, the national survey of recreational demand and preference (Heath, 1986; Child and Heath, 1989) indicated a strong interest in future visits to the Estate amongst higher income black Zimbabweans. As has occurred elsewhere in Africa (Adejuwon, 1986), increased urbanisation and rising *per capita* incomes may be expected to create an increase in domestic tourism amongst this sector of the community.

in March 1989, with an average fee increase in the region of 30%. There appears to have been no adverse reaction to these increases and figures to-date (June 1989) indicate that visitor usage of the Estate will substantially exceed that of 1988.

Tourism based upon a 'wilderness experience' differs from other forms of tourism in the amount of space it requires, especially where extensive populations of large mammals are involved. Setting aside a large national park exclusively for wildlife represents benefits foregone from, say, pastoralism and this cost should be offset against the advantages to society from having the park.

Protected areas are not isolated from their neighbourhoods and, in Zimbabwe, most occur in parts of the country which have a low agricultural potential and are generally economically disadvantaged. Tourism is relatively labour intensive. In addition to formal employment, tourism to rural areas also creates many opportunities for informal employment by providing markets for local artisan products, thus establishing a mechanism for reversing the usual flow of wealth from rural to urban sectors.

Many of Zimbabwe's parks and reserves are strategically placed to stimulate viable tourist marketing in surrounding areas but this must be within a carefully evolved strategy if some of the well documented pitfalls associated with tourism are to be avoided (Smith, 1983; Heath, 1989). Low prices, governed by the philosophy that the Estate should be available to all Zimbabweans, are actually benefitting those residents and foreign visitors who are best able and probably most willing to pay more. They are thus precluding tourism from fulfilling its potential for enhancing sustainable rural production. Low pricing also acts against the retention of large protected areas for wildlife and future tourist developments.

Receipts from tourism can be increased by either raising charges or increasing the throughput of visitors and this depends more upon human initiative and labour than upon environmental energy. This paper indicates how increased visitor usage might be achieved, by altering the nature of the accommodation amenities on offer, and by increased advertising of the Estate and its facilities in order to attract greater numbers of foreign visitors, particularly during mid-week periods and during the quieter times of the year.

Efficient development and use of the tourism resource within a national strategy requires that information about the market be available. This paper presents such data, vindicates the DNPWLM's past concern at its lack of resources for assembling and evaluating data and confirms the importance of this information if the Department's multi-million dollar investment in land and amenities is to be used efficiently.

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